

# working with technical volunteers



A Manual for Nonprofit Organizations



Working with Technical Volunteers Manual

Version 2

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## CHAPTER 1: Introduction

Many nonprofits and schools do not have enough time, expertise or funding to use technology in all the ways they would like. Technical volunteers can fill the gap by tackling projects that in-house staff cannot handle and that do not require paid consultants. This manual has been created as a guide for nonprofit organizations and schools that want to work with technical volunteers.



### **What's Covered:**

- Why did we make a manual about technical volunteers?
- How to use this manual
- About TechSoup

### Why did we make a manual about technical volunteers?

Nonprofit organizations and schools seem to keep their computer systems going the same way they keep everything going: a few really creative, resourceful people take charge and perform miracles! Often, there is a spectrum of technical needs that are beyond the training and experience of staff that can be met by a volunteer. Obtaining technical volunteer support presents its own challenges for many nonprofits and schools.

Even groups that have successfully involved volunteers in their work sometimes run into problems when asking volunteers to work on technology issues. Recruiting and managing technical volunteers can be intimidating, especially when staff people do not fully understand the work that techies do. In addition, organizations must balance the benefits of technical volunteers' help with the need to establish sustainable, consistent computer support.

After nearly two decades of recruiting, matching and managing technical volunteers, TechSoup has developed an effective methodology. We have found several key ingredients to a successful technology volunteer project. These include:

- Well-defined needs
- Specific deliverables
- Flexible, short-term schedule
- Clear, consistent communication
- Built-in sustainability

We have designed this manual with these elements in mind.

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## How to use this manual

This manual is intended to help organizations and schools:

- Assess their technical needs and identify areas in which volunteers can help
- Recruit technical volunteers, assess their skills and screen them
- Manage technical volunteers
- Document the work that is done
- Find resources that will help throughout the process

Chapters 2 through 4 of this manual describe sequential steps in the technical volunteer process. Whenever possible, we have provided specific examples from our projects to help you see how other organizations have worked with technical volunteers. We also try to give you the reasons that each step is important to your success.



Following the explanations in Chapters 2 through 4, you will find worksheets or templates for planning and documenting your project. We have also provided online resource lists of technical assistance providers outside the scope of TechSoup, called TechFinder.

The worksheets include:

- Technical Volunteer Questionnaire
- Technical Inventory for your organization
- Ways to document your technical projects, whether you are working with consultants, paid staff, volunteers or all three

This manual, which is free of charge, can be downloaded from our Web site ([www.TechSoup.org](http://www.TechSoup.org)) so that you can personalize the worksheets and other tools to best suit your needs. We recommend keeping both the templates and completed project documentation in a central location. In order for the information and tools to be most helpful, you will need to train technical project staff to use them.

## About TechSoup

Since 1987, TechSoup has been helping nonprofits and schools to access and use technology. Our other services include:

- Donated and discounted software for nonprofits through TechSoup Stock
- Technology assessments and planning assistance for nonprofits and schools
- TechSoup.org, a comprehensive Web site of technology resources, discounts, how-tos and referrals for nonprofits

TechSoup is a 501(c)(3) nonprofit organization. Please contact us for more information about our services or to provide feedback about this manual.

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## CHAPTER 2:

# Preparing to Work with Technical Volunteers

Because volunteers have a limited amount of time to help you, it's extremely important to know just what you want them to do. You should consider preparing for new volunteers as you would for a new employee or consultant. This section will help you:

- Decide who can best accomplish each task
- Scope a successful volunteer project
- Create a volunteer project description



### What's Covered:

- Who are technical volunteers?
- Determine who can best meet your needs
- Scope a successful volunteer project
- Write a volunteer job description
- Sample Volunteer Job Description
- Chapter 2 At A Glance

## Who are technical volunteers?

Technical volunteers are enthusiastic, skilled individuals who also care about contributing to society. They may be accustomed to a different working environment than yours, but they have come to your organization to help contribute to its efforts. Everything you can do to maximize the time they spend with you will increase mutual satisfaction with the arrangement, as well as encourage a volunteer to repeat their gift of time and expertise.

Based on our experience, it's helpful to recognize some generalizations about technical volunteers. While these characteristics do not apply to all situations, technical volunteers are generally:

- Accustomed to a fast pace
- Results-oriented
- Willing to go the extra mile
- More informed than you on technology issues

Discussing differences in working style and expectations will help orient a volunteer to your organization and define a successful working relationship. For more on this topic, see Chapter 4, "Managing Technical Volunteers," on page 16.

## Define and prioritize needs



Technical volunteers can be most effective when you explain your needs clearly. Often, nonprofits and schools start from a place where they do not know what they need, but simply know that they could use some assistance. The worksheet entitled “Technology Assessment” includes a series of questions to help narrow this desire into more specific goals. The following are some of the key considerations:

- What role has technology played in your organization in the past?
- How do you see technology enhancing your ability to fulfill your mission or grow as an organization?
- What resources does your organization have available for technology? What are the obstacles?
- Who has been responsible for technology planning and implementation, and who do you think needs to be involved or trained in the future?

If you need help with the technology evaluation process, consider having a (paid or volunteer) professional conduct a formal needs assessment.

## Determine who can best meet your needs

After you have identified and prioritized needs, the next step is to determine who can address each one. It’s important to establish realistic expectations of how volunteers can help your organization, class or school. Keep in mind that in some cases, you could be better off paying someone to accomplish the work.

Volunteers can be wonderful sources of technology support, but they cannot always solve your problem. Before you bring on a volunteer, think through which of your technology needs are suited to a volunteer project and which would be better met by a consultant or a system administrator. A mismatch between the project and the kind of assistance you seek can waste time and resources for everyone concerned. The bottom line is that your use of a volunteer should be a planned and thought-out part of your overall technology support strategy.

We have found that technical volunteers can be most effective if they are assigned work that is clearly defined, short-term and non-urgent. In other words, don’t ask for too much, and never forget that the person is donating their free time. Keep in mind that most people volunteer because it feels good; the best volunteer projects offer opportunities for making a significant contribution to an important cause and for meeting new people and having fun.

### **Before you decide to search for a volunteer, ask yourself the following questions:**

- *Is your need short-term or ongoing?*  
For regular maintenance issues, like backups and user support, consider training someone on staff who can be available to the organization on a consistent basis. Volunteers’ schedules often vary, so it’s best not to count on a commitment of longer than a few months. It’s wonderful if a volunteer decides to provide ongoing support, but the organization will almost certainly run into situations for which the volunteer is too busy to help.

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- *Is the project urgent or mission-critical?*

If so, it's best to hire a consultant or a system administrator. Volunteers may not be available for urgent or time-sensitive needs, due to other commitments, such as their jobs. However, if your timeline is more flexible, a volunteer may fill your need. For instance, if you need someone to repair your database so that you can access contact information about your clients for daily phone calls, you should probably hire a consultant. If you need training on how to use your database to generate reports for a grant deadline several months from now, a volunteer might be perfect.

- *What is your potential budget?*

A volunteer is a low-cost solution up-front. If what you need is a consultant or system administrator, you will have to raise the money for it.

- *Is the project limited in scope?*

An ideal volunteer project is one that you can break down into specific, achievable tasks with a clear deliverable at the end. The project should be a small part of the overall technology plan for your organization.

For instance, in TechSoup's experience, creating and managing a database is almost always too big a project for a volunteer. A volunteer might be able to do a limited portion of a database project, such as assessing an existing database and making a recommendation for how to develop it.

- *What time commitment does the project require?*

If your project requires a more sustained effort over many months, a consultant on contract might be a solution to consider.

- *What kind of follow-up will be needed?*

Does the project require ongoing maintenance? If so, you may want to hire or dedicate a staff member. For instance, if you ask a volunteer to create a Web site with a page of information about upcoming events, you will need to plan on resources and expertise to update it. Depending on the complexity of follow-up required, your volunteer might be able to train a staff member as part of the project.

Your organization will also reap the most benefit if you document all changes and upgrades a volunteer makes to your computer systems.

- *How large is your organization?*

If you have more than 15 or so computers, seriously consider hiring a part-time or full-time system administrator, or contracting a consulting firm to do regular maintenance. Volunteers can still be useful on specific tasks — and can be a great asset to system administrators — but they cannot substitute for consistent, ongoing support from a staff person or regular contractor.

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## Scope a successful volunteer project



Once you have determined that your organization could use a technical volunteer, you will need to specify the types of tasks involved. Certain types of projects — due to their scope — are more appropriate for volunteers than other projects. Here, we discuss some typical projects. In the worksheet section, we provide a list of considerations for further defining each type of project (see the Appendix on page 23).

### *Training*

A volunteer can be successful at providing certain kinds of training to you or your staff. Volunteers can be especially good for one-on-one tutoring, a kind of training that is extremely desirable but not always cost-effective with a consultant. A project could include a volunteer coming in to observe a staff person working and teaching them how to improve their efficiency and use applications better. A rare volunteer may have the teaching experience necessary to prepare materials and give a full-fledged training to a group of people. When you are screening volunteers to perform training, make sure they have aptitude and interest in teaching, not just technical expertise. Ask about their teaching experience.

### *Web design*

Volunteers can be a huge help to an organization that needs to build a Web site or update an existing site. Volunteers often enjoy Web projects because the work can be done on a flexible schedule from their home or office. However, building a new site involves many steps: planning the content and design, developing the technical components of the site, purchasing a domain name and Web hosting space, and uploading the site. In addition, the site will require maintenance and your staff may need training in order to do it. As mentioned previously, handling all of those steps is a huge job and probably an unrealistic expectation of a volunteer. Engage a volunteer for particular components, such as helping you evaluate Web hosting companies.

### *Local area network*

Volunteers can be successful in setting up a small local area network and training someone on staff on how to maintain and troubleshoot it. Fixing existing networks is a little more complicated. If you need someone to “pull cable” (extend wiring to each computer, printer or other network device), we recommend hiring a consultant. One reason is that you will want the work to be guaranteed, and another is that pulling cable sometimes means drilling through walls near power supplies. If a volunteer starts using power tools for you, make sure you are clear about your liability for his or her safety.

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### *Troubleshooting hardware and software*

A volunteer can be successful at troubleshooting tasks as long as you are clear about what the specific problems are that you need addressed. For example, you might ask a volunteer to look at a PC that keeps crashing or a printer that sometimes garbles your print jobs. Ultimately, it's best to have someone on staff who knows your systems and is responsible for troubleshooting. It's usually an urgent problem when computers crash, and a volunteer might not be able to respond quickly enough.

### *Assessing old or donated equipment*

How can you use donated equipment most effectively? A volunteer can be of great help when deciding which machines can be incorporated into your office setup. A good example of a volunteer project might be assessing five computers, telling you which ones are worth saving and making recommendations for upgrades and recycling options.

### *Installing memory or new peripherals*

If you know you need more memory or a peripheral but don't know exactly what it involves or how to get it, a volunteer could help by making recommendations, physically installing new memory or setting up a new printer, scanner, or back-up system.

## Write a Volunteer Job Description

Once you have identified appropriate volunteer projects, you need to write descriptions that summarize your requirements, much like paid job descriptions. Be sure to include the specific project objectives, available resources (such as budget and supplies), needed skills and time commitment. Clarifying the scope of work ensures that you won't forget important parts of the job and helps volunteers know what to expect.

### *Mission and background*

Volunteers come to you because the impact of their efforts is amplified by the work that you do. They will want to know what you stand for. Convey the basic thrust of your work and who benefits. If you work for a school, include information about the ages and backgrounds of the students, the school's history, information about what your class is currently studying or anything that might be of interest to potential volunteers.

### *Description of the project*

A clearly defined project helps attract volunteers. Many will be reluctant to take on a project that is not well defined for fear it will take more time than they are willing to give. Even if the time commitment is clear, the volunteer will be wary of spending less time lending his or her expertise and less time accomplishing tangible tasks.

In your description, explain:

- Specific tasks to be accomplished
- Hardware and software involved
- Goal of the project

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### *Skills needed to do the project*

Does the volunteer need to know a particular accounting or database application? Do you need someone who knows local area networks (LANs) or Web development? If necessary, do some research so that you can be as specific as possible.

### *Time commitment*

Try to estimate the number of hours the project will take. The number of weeks a volunteer has to complete the project, as well as any deadlines, affects a volunteer's decision to take on a project.

### *Work schedule*

What are the hours of the volunteer liaison on your staff? Can the work be done only between 9 A.M. and 5 P.M.? Does the staff person have any flexibility or ability to be there to meet with the volunteer on nights or weekends?

### *Contact information*

Who is the volunteer liaison on your staff, and what is the best way for a potential volunteer to get in touch with that person?

## Sample Volunteer Job Description

### **Lab Volunteer**

The lab is a science classroom for students in grades 4 through 8. Students take field trips to our lab, where they can participate in hands-on experiments in chemistry, biology and physics. We also have a computer science component of our programs. The lab is located in downtown Berkeley, CA, and is accessible by public transportation. We are looking for a technical volunteer experienced with DSL, XP and firewalls to assist us with the following:

- Connect DSL router to network.
- Configure seven PCs (running Windows XP and Vista) to use DSL over the network.
- Assess firewall needs and set up firewall.

We would like to finish this project within two months. We can accommodate a flexible schedule, but our building is locked and inaccessible after 9 P.M.

Interested volunteers should contact:  
Susie Schmoozie at [susie@thelab.edu](mailto:susie@thelab.edu)



### Key Points Recap

- While these characteristics do not apply to all situations, technical volunteers are generally:
  - Accustomed to a fast pace
  - Results-oriented
  - Willing to go the extra mile
  - More informed than you on technology issues
- Prepare for new volunteers as you would for a new employee or consultant:
  - Define and prioritize needs
  - Decide who can best accomplish each task
  - Create a Volunteer Job Description
- To define and prioritize your volunteer needs, you should first evaluate your technology process.
- After you have assessed your needs, your next step is to determine who can address each one. Establish realistic expectations of how volunteers can help your organization, class or school.
- Volunteers can be most effective if they are assigned work that is clearly defined, short-term and non-urgent.
- Once you have figured out that your organization could use a technical volunteer, you will need to specify the types of tasks involved. Certain types of projects — due to their scope — are more appropriate for volunteers than other projects.
- The volunteer needs to know what they are being asked to do. A clear job description (for staff or volunteers) is essential for success.



## Your Chapter 2 Checklist

- Define and prioritize volunteer needs.** Consider some of the following questions:
  - What role has technology played in your organization in the past?
  - How do you see technology enhancing your ability to fulfill your mission or grow as an organization?
  - What resources does your organization have available for technology? What are the obstacles?
  - Who has been responsible for technology planning and implementation, and who do you think needs to be involved/trained in the future?
- Determine who can best meet your needs.** Before you search for a volunteer, ask the following questions:
  - Is your need short-term or ongoing?
  - Is the project urgent or mission-critical?
  - What is your potential budget?
  - Is the project limited in scope?
  - What time commitment does the project require?
  - What kind of follow-up will be needed?
  - How large is your organization?
- Scope out your volunteer project.** Some considerations to help further clarify a project and types of tasks involved include the following:
  - Training
  - Web design
  - Local area network
    - Troubleshooting hardware and software
    - Assessing old or donated equipment
    - Installing memory or new peripherals
- Write a Volunteer Job Description.** Make sure the description contains the specific project objectives, available resources (such as budget and supplies), needed skills and time commitment. Include the following:
  - Mission and background
  - Description of the project
  - Skills needed to do the project
  - Time commitment
  - Work schedule
  - Contact information

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## CHAPTER 3: Finding Volunteers

You have identified and prioritized your organization's technology needs, and you have scoped out where and how technical volunteers can be most effective. You are now ready to seek out the right volunteers through the appropriate channels. Once you have some potential candidates in mind, it's important to take the time to properly screen them. In this section, you'll find a set of guidelines to help you in this effort.



### What's Covered:

- Identify a volunteer liaison
- Post your call for volunteers
- Screen potential volunteers
- Use the Technical Volunteer Questionnaire
- Use the Technology Inventory
- Chapter 3 At A Glance

### Identify a volunteer liaison

Before you bring your technical volunteers on board, you need to consider who will:

- Recruit and screen them
- Work with them
- Provide supervision for the volunteers' work
- Be there to thank them appropriately

To make communicating with your organization easier for the volunteer, and to make monitoring the project easier for you, identify one staff person or teacher to handle communication with your volunteer. When a volunteer helps you with your computers and something goes wrong, you don't want to overwhelm him or her with five separate help requests during the week. Instead, think about combining your requests in one call. Ideally, the liaison should also be available to meet with the volunteer at his or her convenience, which may mean having the flexibility to work occasional evenings and weekends.



*Identify one staff person or teacher to handle communication with your volunteer.*

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## Post your call for volunteers

Once you have written your Volunteer Job Description, the trick is to get it out into the community to places where people with both technical skills and a social conscience will look. The following is a partial list of places to try:

- **Volunteer listing services** – A volunteer listing service provides a place for nonprofits to post their Volunteer Job Descriptions and for potential volunteers to decide which agency to work with. The job descriptions may be listed online or through a local volunteer center.
- **Corporate Volunteer Programs** – Many corporations have bulletin boards on which they post volunteer opportunities. You can find tech-savvy volunteers in most companies, not just in companies that specialize in technology.
- **Schools and Community Colleges** – Many vocational schools and community colleges will post your Volunteer Job Description in a career center or on a departmental bulletin board. Some professors may announce the opportunity in their classes. Try contacting departments related to technology, such as engineering and computer science.
- **Your colleagues** – Ask colleagues at other nonprofits in your community where they go for technical volunteers.
- **Other volunteers** – Often, current volunteers are the best source for new volunteers. They may know of someone, or they can tell you where to post a job description.
- **Mailing lists** – More and more people are using mailing lists to communicate about community needs and events. Ask around about the mailing lists people in your community belong to, especially those relevant to people with computer skills. Find a person who belongs to the list to post your job description for you.
- **User groups** – User groups meet either in person or online to discuss different types of hardware and software. Look for them in your local computer newspaper (if you have one) or on the Internet. Yahoo! and Google user groups, Craigslist.org, and Yahoo's hardware user groups are good places to start.
- **Newspapers and newsletters** – You can list your Volunteer Job Description free of